

Draft Compliance Rubric

	OVERVIEW¹	INCLUDED?²	IF INCLUDED, COMPLIANT?	DESCRIPTION OF NON-COMPLIANCE
REQUIRED PROVISIONS		If no, automatically not compliant		
Parties	School employer			
	Exclusive Representative			
	Composition of the bargaining unit (positions included/excluded)			
CBA term	Not past state budget biennium			
Ratification section	Signed by agent of each governing body on or after August 1.			
REQUIRED SUBJECTS		If no, automatically not compliant		
Salary	Salary range, including the starting amount/calculation for salaries			
	Compensation plan*			
	Compensation plan clearly defines			

¹ Asterisks in this column refer to mandatory subjects of bargaining. If the parties agreed that no increases or benefit would be provided, the CBA must contain a statement to that effect.

² [note to CO: if not compliant, list where non-compliant provision/subjects is located (e.g., Article I, Section A, p. 5).]

	eligibility			
	Compensation plan uses 2-4 statutory factors (evaluation, education and experience, leadership, academic needs)			
	Education and experience does not exceed more than 33% of increase calculation			
	Compensation plan includes definitions of the factors			
	Compensation plan either includes a defined amount, or calculation of, increases or provides for redistribution of increases for those rated ineffective or needs improvement			
	Other permissible salary items (e.g., wage payment agreements, salary for supplemental contracts, dues deductions, payment for extended contracts, general payroll deductions) (not required)			
Wages	Payment for ancillary, co-curricular, and extra-curricular duties/activities*			
Salary and wage related fringe benefits	Accident*			
	Sickness* (may not accumulate more than 90 paid sick days) ³			

³ There is an exception for days accumulated on January 1, 1966.

	Health			
	Dental*			
	Vision*			
	Life*			
	Disability*			
	Retirement benefits*			
	Paid time off as permitted to be bargained under IC 20-28-9-11* (paid bereavement cannot exceed 5 days per year)			
	Other permissible salary and wage related fringe benefits ⁴ (not required)			
PERMISSIBLE PROVISIONS				
	Grievance procedure (may contain binding arbitration only within scope of bargaining)			
	Definitions			
	Contract interpretation provisions			
	Non-subject provisions that are not impermissible			
IMPERMISSIBLE ITEMS		If yes, automatically not compliant.		Note: The Compliance Officer is not completing an exhaustive review of all

⁴ A fringe benefit is a benefit, other than direct salary or compensation, received by a school employee from a school employer, including but not limited to health insurance, retirement plans, and paid time off.

				rights and benefits established under state and federal law. Therefore, an indication of compliance in this section means only that the Compliance Officer upon review, did not find any impermissible provisions.
	MOUs not pursuant to a Board order or permitted by the Compliance Officer			
	Any subject other than salary, wages, or salary and wage related fringe benefits			
	Provisions that conflict with any right or benefit established by federal or state law			
	Provisions that conflict with school employee rights as set forth in IC 20-29-4-1, 2			
	Provisions that conflict with school employer rights set forth in IC 20-29-4-3			
	Provisions that conflict with restructuring options available as described in IC 20-29-6-2(a)(4)			
	Provisions that conflict with the school employer's ability to work with an education entity as provided in IC 20-29-6-2(a)(5)			
	Other (detail must be provided)			

Scope of review: This review is based on the CBA as provided to IEERB by the parties. This review does not include an evaluation of deficit financing. It also does not include an evaluation of whether the health insurance plan is compliant with IC 20-26-17 (HEA 1260-2011). Finally, as mentioned above, the review does not include an exhaustive review of whether any provision of the CBA conflicts with any state or federal right, benefit, or law.